

## Using the Filter Option to Add a Source of Supply

Use this procedure when there is a need to **add** a Source of Supply (supplier referenced in Agency or Statewide contract) for each line item in the shopping cart.

Upon entering the material or service item(s) into the cart, you can either:

1. Select the **hyper-linked Line-Item** number, or

a. Select the **checkbox** next to the line-item number and select the **DETAILS** button.

Create Shopping Cart

Shop in 3 steps: Step 2 (Shopping Cart (1 item))

Save Check

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Price
<input checked="" type="checkbox"/> 1	Material	Software	43230000	SOFTWARE		3.000	EA	201.67	USD		

Notice, the Line-item details open to **Item Data** tab.

2. Select the **Source of Supply** tab

Create Shopping Cart

Shop in 3 steps: Step 2 (Shopping Cart (1 item))

Save Check

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview

Identification

Item Type: Material

Product ID:

\* Description: Software

Catalog:

Product Category: 43230000 SOFTWARE

Currency, Values and Pricing

Order Quantity / Unit: 3.000 EA Each

Ordered Quantity / Unit: 0.000

Open Quantity / Unit: 0.000

Price / Currency: 201.67 USD Price Unit:

Service and Delivery

### 3. Shown here is a full screenshot of the **Source of Supply** tab.

- a. Scroll to the far right of the screen and select the **Filter** option. Upon selection of the filter icon, it may appear as nothing has happened. Follow steps 4. and a. to have the option for the **'User-Defined Filter'** available.

Details for item 1 Software

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview

No supplier has been assigned; select and assign one of the following sources of supply

Sources of Supply

Assign Supplier Compare Suppliers **Filter**

Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Currency	Per	Unit	In Supplier List	Priority Rank	Priority Description	Interlinkage
<input checked="" type="checkbox"/> 102380	IBM CORPORATION	4400016179	2	Licenses/Appliances/Subscriptions/SaaS		201.67	USD	1	EA	No	0		No
<input type="checkbox"/> 102519	KONICA MINOLTA BUSINESS SOLUTIONS	4400016527	4	Digital Production Software & Access		201.67	USD	1	EA	No	0		No
<input type="checkbox"/> 102545	SHARP ELECTRONICS CORPORATION	4400016522	4	Digital Production Software & Access		201.67	USD	1	EA	No	0		No
<input type="checkbox"/> 102592	CANON USA INC	4400016524	4	Digital Production Software & Access		201.67	USD	1	EA	No	0		No
<input type="checkbox"/> 104274	XEROX CORPORATION	4400016523	4	Digital Production Software & Access		201.67	USD	1	EA	No	0		No

You may suggest a preferred supplier to the purchasing department

Preferred Supplier:

### 4. Select the column you want to filter by (example: **Contract** column)

- a. Select the (User-Defined Filter...)

Details for item 1 Software

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply

No supplier has been assigned; select and assign one of the following sources of supply

Sources of Supply

Assign Supplier Compare Suppliers

Supplier Number	Supplier Name	Contract	Item	Contract Item Description
<input checked="" type="checkbox"/> 102380	IBM CORPORATION			Licenses/Appliances/Subscriptions/SaaS
<input type="checkbox"/> 102519	KONICA MINOLTA BUSINESS SOLUTIONS			Digital Production Software & Access
<input type="checkbox"/> 102545	SHARP ELECTRONICS CORPORATION			Digital Production Software & Access
<input type="checkbox"/> 102592	CANON USA INC			Digital Production Software & Access
<input type="checkbox"/> 104274	XEROX CORPORATION			Digital Production Software & Access

Sort in Ascending Order  
Sort in Descending Order  
(All)  
**(User-Defined Filter...)**

5. Enter the criteria (example: contract no.) in the space provided and select the **FILTER** button.

Custom Filter

Use \* to Represent Character Strings

Filter By

Contract:

**Filter** Cancel

6. The information will display.

In the example, the Contract column was selected, and the contract number was entered into the filter by field. Once the filter button was selected, only that contract is displayed.

Details for item 1 Software

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview

No supplier has been assigned; select and assign one of the following sources of supply

Sources of Supply

Assign Supplier Compare Suppliers [Delete Filter](#)

<input checked="" type="checkbox"/>	Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Currency	Per	Unit	In Supplier List	Priority Rank	Priority Description	Interlinkage
<input checked="" type="checkbox"/>	316904	CARAHSOFT TECHNOLOGY CORP	4400004253	1	Software		201.67	USD	1	EA	No	0		No
<input type="checkbox"/>														
<input type="checkbox"/>														
<input type="checkbox"/>														
<input type="checkbox"/>														

You may suggest a preferred supplier to the purchasing department

Preferred Supplier:

< Previous Next > Order Close

7. Select the line item of the contract and select the **ASSIGN SUPPLIER** button.

Details for item 1 Software

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview

No supplier has been assigned; select and assign one of the following sources of supply

Sources of Supply

Assign Supplier Compare Suppliers

<input checked="" type="checkbox"/>	Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price
<input checked="" type="checkbox"/>	316904	CARAHSOFT TECHNOLOGY CORP	4400004253	1	Software		201.67
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

8. The Source of Supply (Assigned Supplier against the contract) displays.

Create Shopping Cart

SAP Shop in 3 steps: Step 2 (Shopping Cart (1 item))

Save Check

1 2 3

Select Goods/Service Shopping Cart (1 item) Complete and Order

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per
1	Material	Software	43230000	SOFTWARE		3.000	EA	201.67	USD		1

Details for item 1 Software

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview

Remove Assigned Supplier

The Item Will Be Ordered from the Following Supplier:

Supplier: 316904 CARASOFT TECHNOLOGY CORP

Purchasing Info Record:

Location / Plant: DGS Bureau of Procur...

4

Previous Next Order Close

**NOTE:** Repeat the steps to add the same Source of Supply (Supplier) for each line item in a Shopping Cart.